

CUSTOMER SERVICE SURVEY RESULTS 2007



PERSI

Public Employee Retirement System of Idaho

Executive Summary

Beginning in January 2007, PERSI initiated a customer service survey effort. Surveys were given to members who came into our offices; this included members with and without appointments. Although the entire PERSI Answer Center (PAC) staff, the PERSI Processing Center (PPC), and the Choice Plan 401(k) staff were instructed to give out a survey after meeting with or assisting members, PAC was predicted to distribute the majority of the surveys. By the end of 2007, nearly half of the surveys (46%) were, indeed, distributed by PAC.

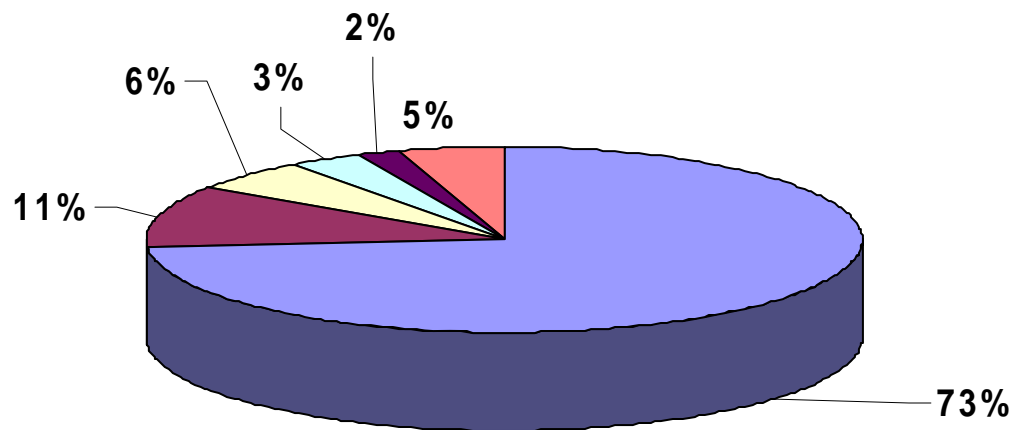
The information in this report is based on 492 customer responses. The purpose of the survey was to measure member opinions regarding staff knowledge, professionalism, and customer satisfaction as it related to PERSI. Responses were primarily anonymous. The survey contained 10 specific questions and allowed for additional comments, which are included in the Appendices at the end of this report. PERSI's goal is to gain understanding of our current level of service and to ensure we are providing the level of service and support our members need and expect. As we begin 2008, PERSI will continue distributing surveys, allowing for comparison from year to year.

It is worth noting that 100% of members who came into a PERSI office in 2007 expressed that we either met or exceeded expectations. This is above the 90% benchmark (somewhat or very satisfied) set in the PERSI Strategic Plan. Regardless of how well an organization is functioning, there is always room for improvement. PERSI will use the member feedback to guide future activities.

Conclusion:

Overall, the survey results are encouraging. Moving forward, survey findings will be used as a tool to advance the culture of customer service within PERSI.

1. What was the nature of your business today?



■ Retirement 415

■ General Information 60

■ Choice Plan 32

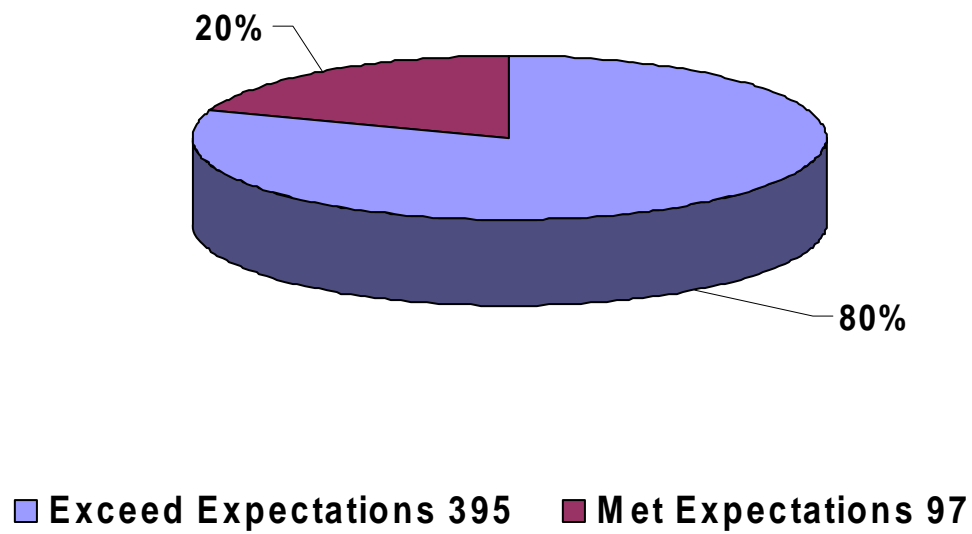
■ Problem Resolution 18

■ Disability 11

■ Other 27

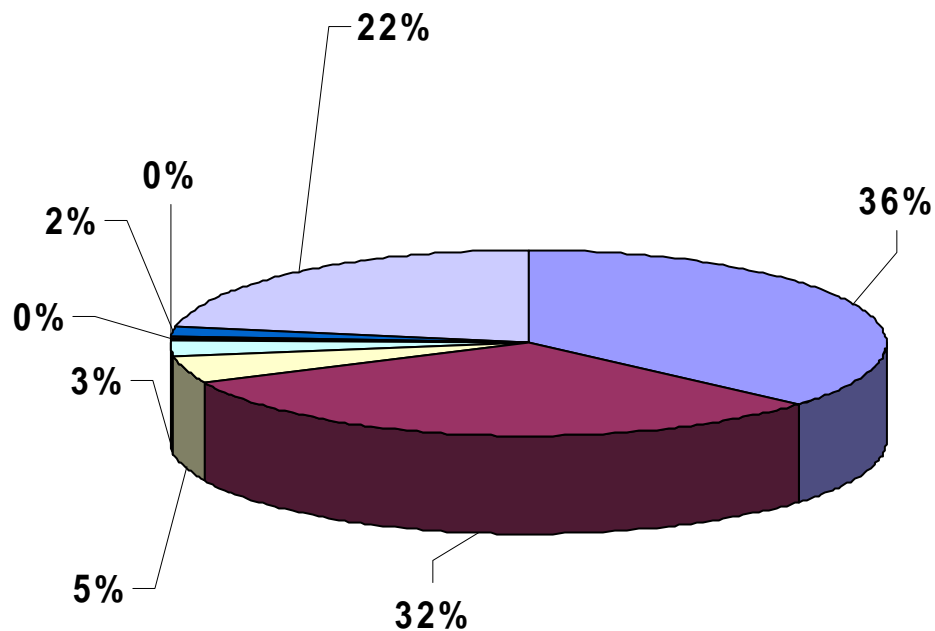
Of the members who responded to this question, the majority indicated they were in the PERSI office because of a retirement issue.

2. When you arrived, did you find the PERSI staff courteous and helpful?



These numbers exceed the 90% benchmark set forth in PERSI's strategic plan. No responses were received indicating the staff fell below expectations.

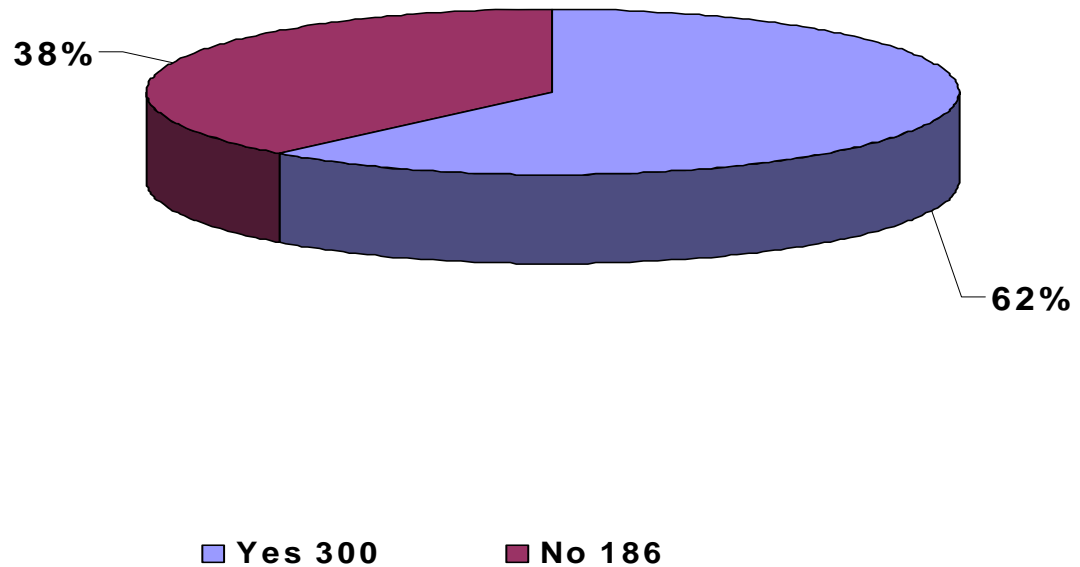
3. If you were a walk-in with a question, how long did it take for you to get an answer?



- I scheduled an appointment 163
- Immediate resolution 142
- 5 minutes 21
- 10 minutes 12
- 15 minutes or more 2
- Was told I'd be called 1
- Other 7
- N/A 100

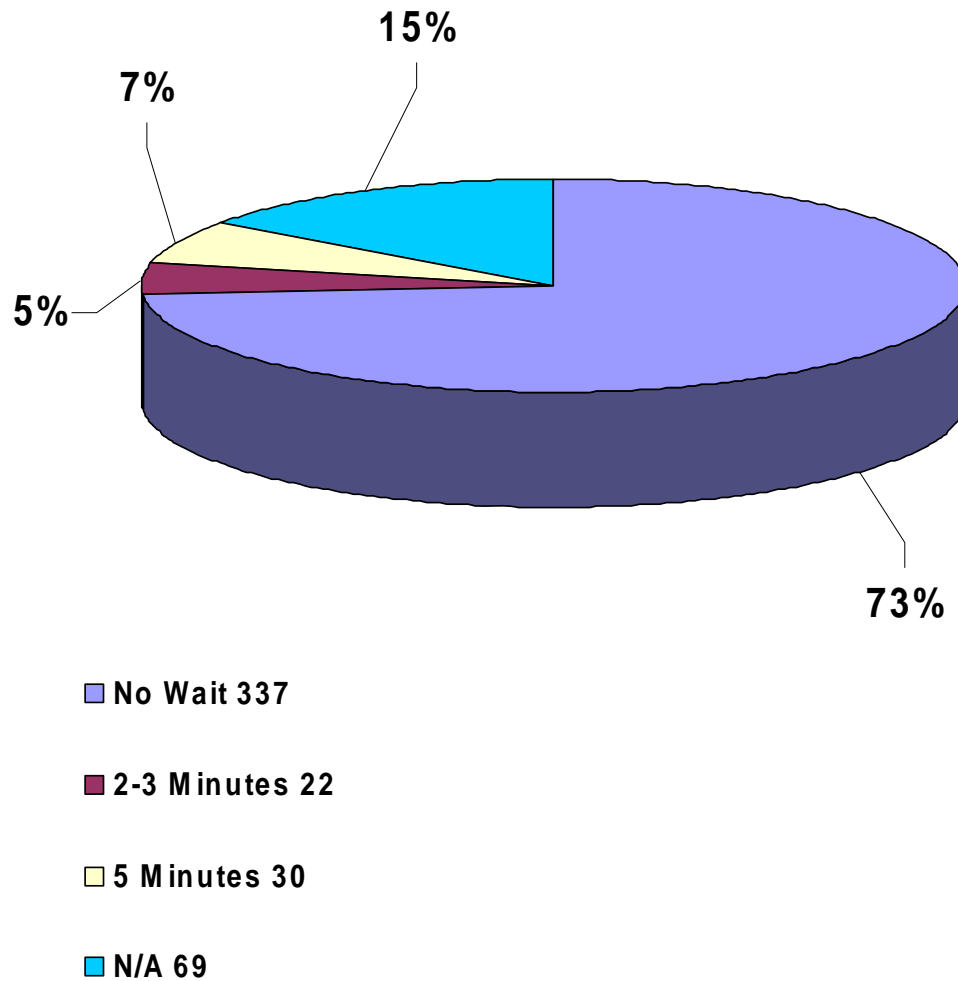
Members without an appointment were not kept waiting more than a few minutes. Approximately one-third (36%) decided to schedule an appointment. The N/A response may indicate members with appointments, even though the question targeted walk-ins.

4. Have you ever contacted or visited PERSI regarding the same problem or issue?



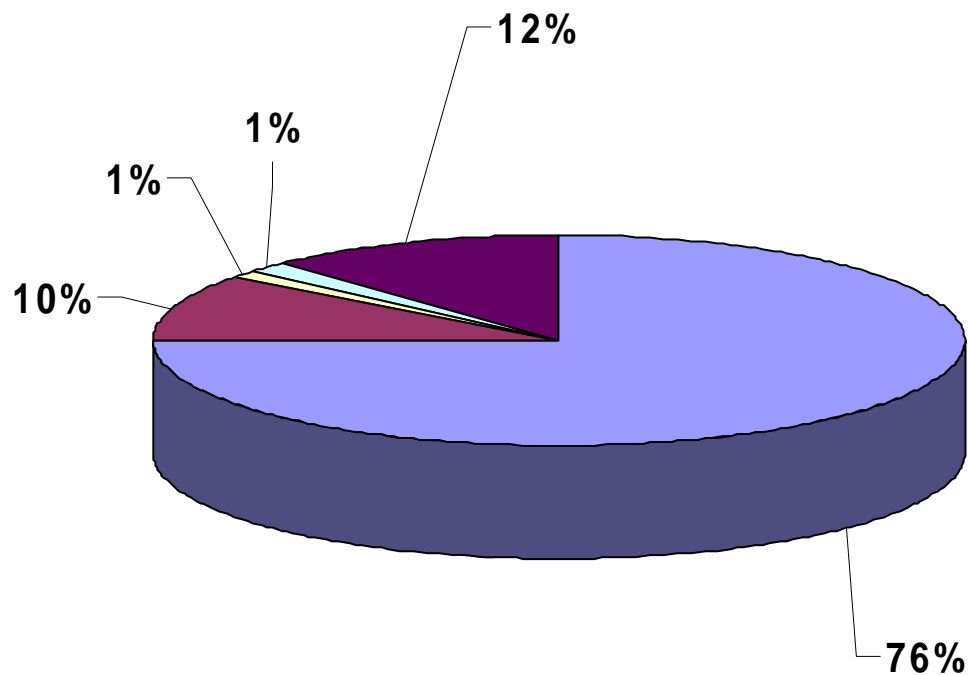
Of the members who responded to this question, approximately two-thirds had contacted PERSI previously about the same problem or issue. This may indicate we need to clarify our responses to member inquiries in the future; it could mean the questions should have been directed elsewhere initially (e.g., insurance); or it could mean the member had new questions regarding an earlier issue.

5. If you had an appointment, how long after your scheduled time were you kept waiting?



Of the members with appointments who responded, nearly three-quarters had no waiting time once they arrived for their scheduled appointment. Members appear to wait, on average, fewer than 5 minutes when they come into a PERSI office - with or without an appointment. The N/A response may indicate some walk-ins felt they had to provide a response, even though the question was directed to members with an appointment.

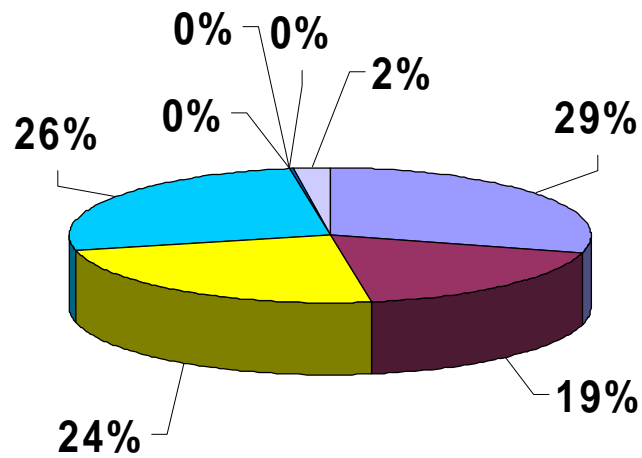
5. How easy or difficult was it to schedule an appointment?



- Very Easy 361
- Easy 50
- Somewhat Easy 6
- Difficult 7
- N/A 58

Of the members who responded to this question, 87% felt the process was easy. This would seem to indicate the implementation of PERSI's new Data and Voice Network, which includes connectivity to field offices in Pocatello and Coeur D'Alene, is working to the benefit of our members. Because of our seamless operations, members calling from anywhere in the state are able to schedule an appointment through the Answer Center regardless of which office they reach. The availability of our Retirement Specialists could also impact the ease or difficulty of making an appointment.

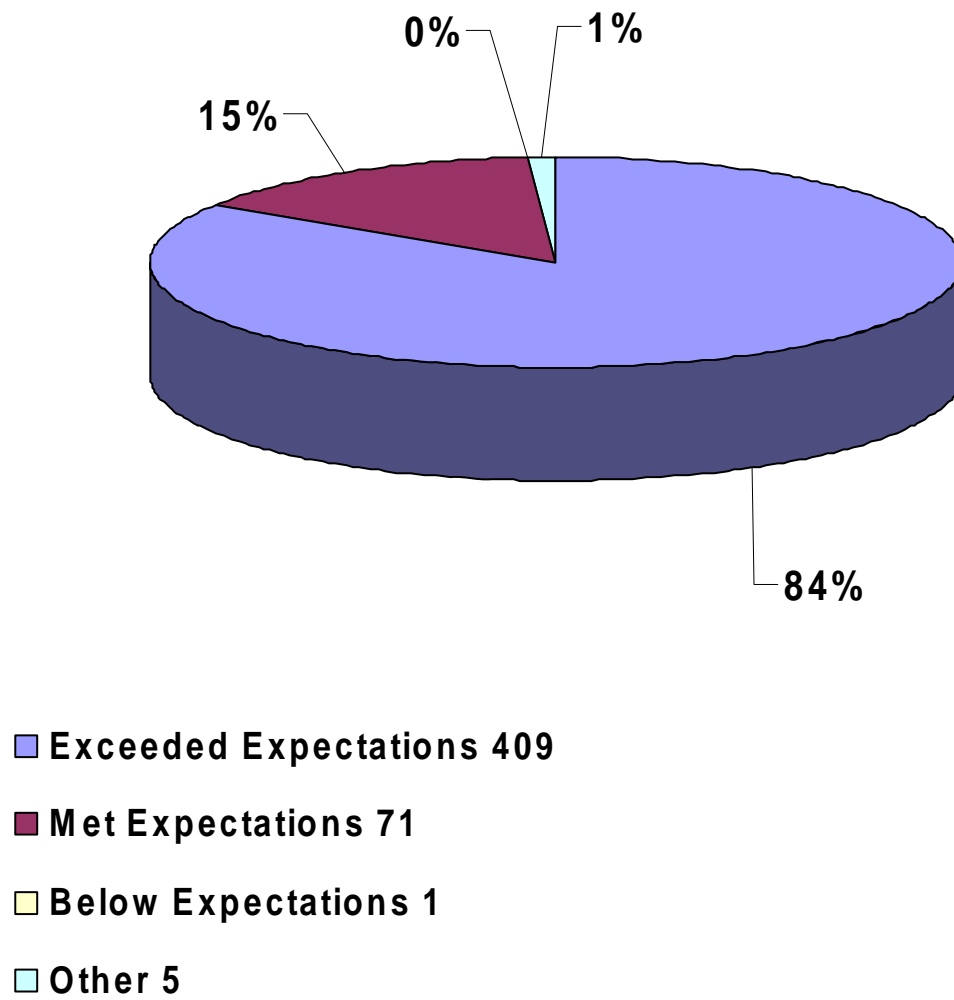
7. Describe the person you met with (multiple answered allowed).



- Appear knowledgeable and competent 472
- Understand the cause of and offer an solution to your problem 301
- Give you adequate time and enough information to make an informed decision 386
- Deal with you in a professional manner 425
- Get interrupted by phone calls during your appointment 1
- Confuse you more 0
- N/A 5
- Other 36

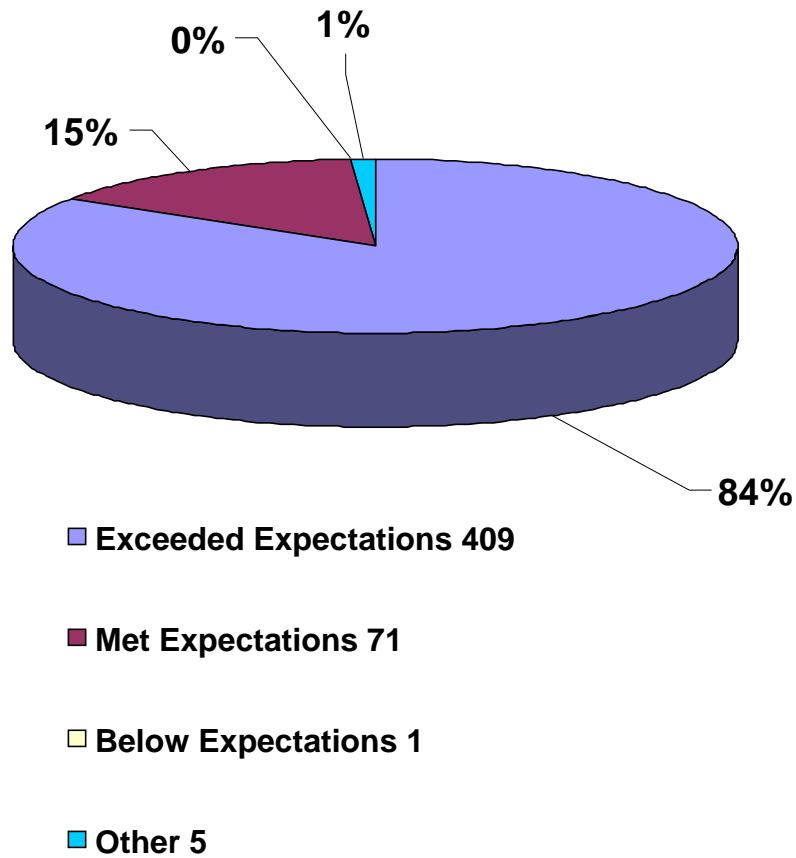
Mid-way through the year, a decision was made that the question as originally written wouldn't provide the best measurement for customer service. The question has been changed for 2008 to rate the ability of the staff to serve members. Still, it is noteworthy that 98% of comments were positive and complimentary to PERSI staff. The N/A or Other responses may have included written responses. They will require further review.

8. How would you rate the knowledge of the staff you encountered today?



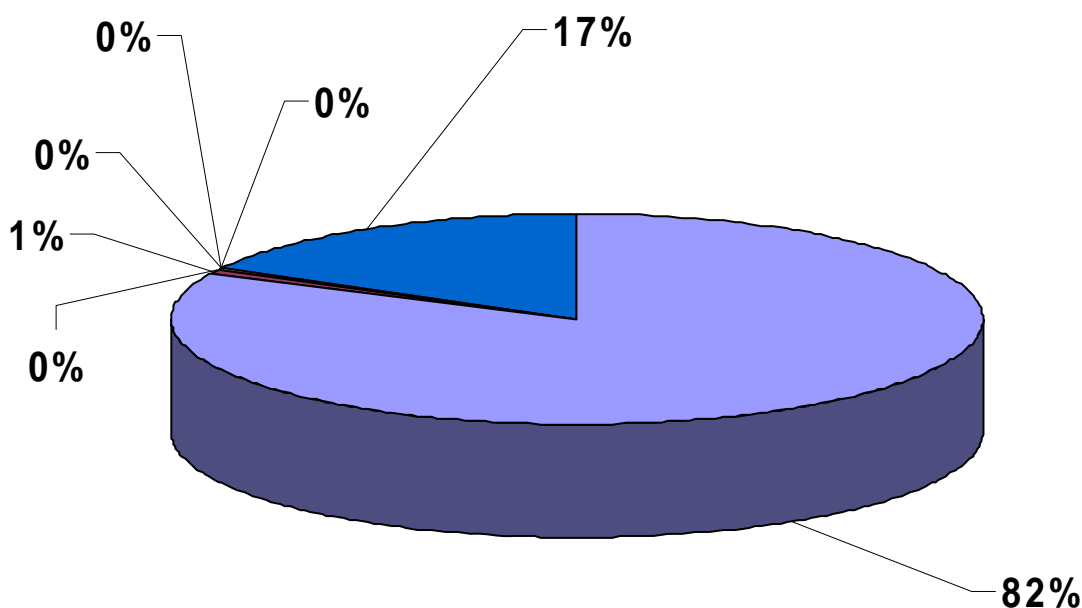
Of the members who responded to this question, 99% expressed that the staff met or exceeded expectations.

9. How would you rate your overall experience with PERSI today?



Nearly 100% of members who responded to this question expressed that PERSI met or exceeded expectations.

10. If you were dissatisfied with your visit today, which of the following best describes the reason why?



- Not Dissatisfied 303
- PERSI Was Disorganized 2
- Given Wrong Information 1
- Questions Weren't Answered 0
- Received Unclear Answers/Info 0
- Unhappy with PERSI Employee 0
- Other 63

Of the members who responded to this question, the majority (82%) were not dissatisfied with PERSI. Those who responded with "other" failed to indicate the nature of their dissatisfaction, making it difficult to determine what action, if any, to take.